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ABSTRACT

This guidebook is one in the Target Topic Series developed to highlight issues and concerns related to effective community education operation. It is intended for the community educator and community education advisory council member who would like to learn how effective and careful planning can improve their community education program. The material explains both why planning is important and how to plan. A pretest covers material discussed in the guidebook. The guidebook covers the components of planning and shows the steps that must be taken for thorough planning. Planning techniques and tools are discussed and samples of planning charts and graphs are included. In addition, organizational aids for planning the involved individual's personal professional time are presented in the guidebook. A posttest repeats the pretest questions. A brief list of suggested readings is included. (YLB)

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TARGET TOPIC SERIES

CHARTING YOUR COURSE

A GUIDEBOOK FOR

COMMUNITY EDUCATION PLANNING

MARTHA L. STANLEY

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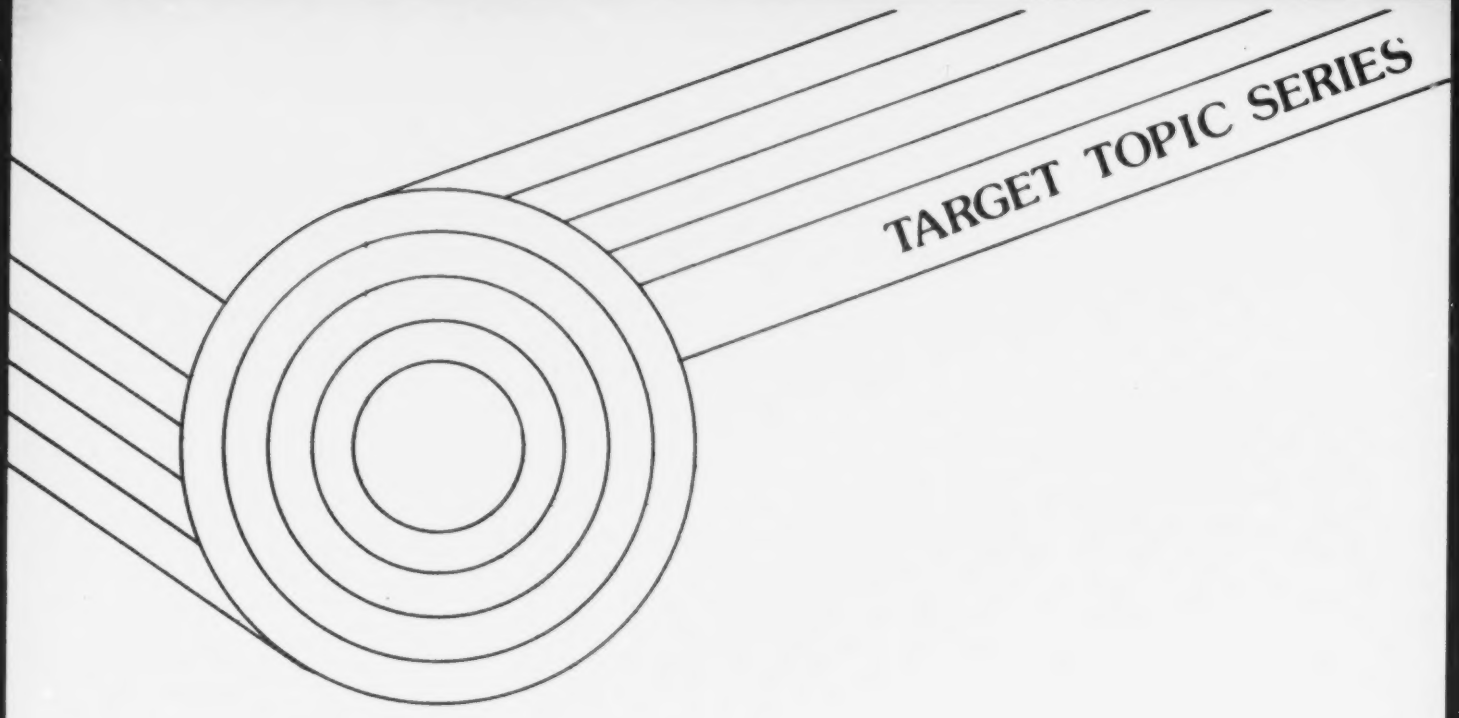


THE TARGET TOPIC SERIES

The Target Topic Series is a set of guidebooks developed for community educators and Community Education advisory council members. The guidebooks discuss many topics related to effective Community Education operation: Council Skills, Community Assessment, Planning, Public Relations, Finance, Programming, Legal Questions, Staff Development, Community Involvement, Coordination and Cooperation, and Evaluation.

The Target Topic Series is designed to highlight the skills or the issues that relate to each subject; and presents an overview which should be of value to the reader.

The Series was developed in response to an identified need for materials to aid and enrich the Community Education process in the state of Minnesota, particularly for areas that do not have ready access to inservice opportunities. The materials are applicable to Community Education programs throughout the country and are available for national distribution.

The Target Topic Serice is written by staff members of the Community Education Center at the College of St. Thomas and by Community Education professionals in Minnesota. The series is distributed by the Community Education Center at the College of St. Thomas

FOREWARD

Dreams and grand ideas remain only dreams and ideas unless we can make them happen. Community Education has the potential to help everyone's dreams come true--those of the people in the community, those of the community itself, and our own dreams. Planning is the key to changing dreams into reality. Planning is the organization, system, and method which leads us from a desire to a goal.

This guidebook has been written to help you learn how to cause the Community Education system in your community to run efficiently, effectively, and smoothly. More than this, however, it has been written to help you make your dreams for Community Education come true.

INTRODUCTION

This guidebook is for the community educator and Community Education advisory council member who would like to learn how effective and careful planning can improve their Community Education program. The material explains both why planning is important and how to plan.

The guidebook covers the components of planning and shows the steps that must be taken for thorough planning. Planning techniques and tools are discussed and samples of planning charts and graphs are included. In addition, organizational aids for personal planning are presented in the guidebook.

"Charting Your Course" is written to help you operate your total Community Education program with the skill and confidence that comes from understanding and using sound planning principles.

WHAT DO YOU KNOW?

(The following questions cover the material which is discussed in this guidebook. We suggest you answer them before reading the text. Your answers will point out your present level of knowledge and will make you aware of areas to which you should pay particular attention.)

1. Why is planning important to the "process" of Community Education?
2. Why is community assessment part of the planning process?
3. Why is planning important for Community Education programs?
4. Why are people resistant to planning?
5. What is planning? How much time does it save?
6. What is the process that connects means and ends?
7. What are the seven steps in planning?
8. How does evaluation relate to planning?
9. What is a goal? What is an objective?
10. What are the components of an objective?
11. What is the function of planning tools and techniques?
12. What is the "simple listing" or "point-to-point" planning tool?
13. What is an overlapping plan and when would it be used?
14. What is a Gantt Chart?
15. What is the "critical path" method of planning?
16. What are the components of an administrative management plan?
17. What is a timeline and for what is it used?
18. How does time management relate to planning?
19. How is a "To Do" list used in personal planning?
20. What can you do to save time--in waiting, interruptions, handling mail and in meetings?
21. How can you avoid procrastination?

PLANNING IN COMMUNITY EDUCATION

> Planning gives direction. Planning provides focus. Planning moves you from "where you are" to "where you would like to be."

Planning is vital to the successful operation of Community Education. Our mission in Community Education is to provide for the needs and interests of community members through the use of community resources. Without planning we have no assurances that we are meeting the needs and serving the interests of the people. Even if we are serving some of the needs and interests, without planning we cannot be sure that we are meeting the most important concerns, or that we are making the best use of the community resources. Planning is needed on all levels and in all areas in which Community Education functions.

- Planning is important to the process of Community Education. Methods for involving community members in decisions which affect them and the life of their community must be determined and put into action.

- Planning is required to ensure that needs and resources are identified and that the best possible matching of needs and resources are found. The entire community assessment process is part of the overall Community Education planning and specific planning techniques are used in conducting community assessment.

- Each individual program, class, activity or service must be planned in order that it runs effectively and efficiently. Programs or services designed to meet community needs will not do what they were intended to without careful attention to how the purposes will be met.

- Administration and management of the complex and varied components of Community Education must be carefully planned. Planning for administration and management brings order to what otherwise would be confusion; it provides for control (supervision and seeing that what should be occurring is indeed happening in the best possible way) and for evaluation (determining if the planned results have occurred).

- Planning brings sense, order and sanity to the professional life of the community educator. Planning techniques that develop personal effectiveness and efficiency provide both the time for creativity and innovation and the sense of freedom and calm that can prevent frustration and discouragement.

Many people resist the idea of planning for various reasons. Some do not know how to plan, some feel that they do a good job "off the cuff," some feel that planning is too time consuming or too restrictive. None of these reasons is valid.

Good planning techniques can be learned. They need not be complicated; they need not be described in technical jargon. Planning is a logical process which, when learned, becomes the natural way to do things.

"Off the cuff" administration may result in some effective actions or successful programs, but the odds are against it happening. We have a responsibility to the community which supports Community Education, and it is neither wise nor moral to take chances with the community's trust or money.

Planning does, indeed, take some time, but the time saved by effective planning more than makes up for the time spent. In fact, the ratio of time saved by planning to time spent in planning is three or four to one. For every hour spent in planning, three to four hours are freed for other things. Planning is not restrictive; instead, it is freeing. There is nothing as restrictive and energy-consuming as operating a program by crisis-reacting or by "putting out fires."

WHAT IS PLANNING

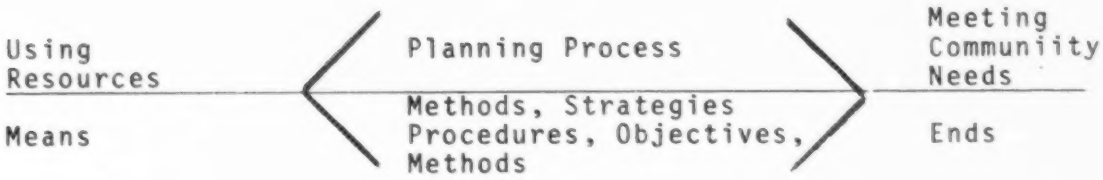
Planning is a logical, sequential, decision-making process that results in anticipated positive change.

Organizations, groups, and people all have certain results they would like to accomplish; they are interested in seeing that positive change occurs. The anticipated positive changes are termed goals. An organization may want to provide programs for the mentally retarded; the new programs are its goal. A group may want to double its membership; the increased membership is its goal. A person may want to study French; learning French is his or her goal.

To attain the identified or determined goals, a logical sequential, decision-making planning process takes place. Planning may be informal or formal, but the process for either is the same. All planning begins by deciding what you

want to accomplish. Then possible ways or methods of reaching the desired result are determined, the methods are studied in relation to resources and costs, the best alternative is specified, and the step-by-step procedures to attain the goal are outlined.

The specific components of planning--objectives, strategies, and procedures--connect means to ends. For example, the goal (or end result) of community assessment is to meet community needs through the use of community resources. Community resources (the means) if used effectively (according to plan) will result in meeting the needs (end).



WHY PLAN

Plans identify and set procedures that bring us to specific goals. Plans provide for the most effective use of resources. Plans outline the system by which organizations and their staffs can carry out objectives. Plans help us to focus our actions on our purposes and intents. Planning determines if what we want to do is cost-effective, that is: is the amount of money to be spent or the amount of energy to be expended worth the anticipated result?

THE PLANNING PROCESS

All planning, whether it be planning the entire Community Education program, planning specific courses or activities, planning for administration of a Community Education program, or personal professional planning, consists of the same elements and follows the same steps. These are:

1. Broad general goals are set.
2. Needs and resources are identified.
3. Priorities are determined based on the greatest needs for which there are available resources or on the greatest needs for which resources can be generated.
4. Objectives are developed that will ensure that goals are met.
5. Strategies or procedures to achieve the objectives are selected and implemented.
6. Results of the goals and objectives are evaluated.
7. Needed changes are made.

Much of the planning we do in Community Education should involve the community--as advisory council members, as participants in needs and resource assessments, as students in classes and partakers in activities, as Community Education staff and volunteers. Community Education is said to be a "process", and this means that how something happens and who is involved is every bit as important as what is done. "Process" means that a community is involved in self-directed, self-determination. We know that any program is more effective if it comes from the people and is done by the people than if it is imposed from above--by a professional, a governmental agency, or self-appointed "do-gooders".

The director and the advisory council determine the broad general goals (Step 1). They are guided by many considerations in setting these goals--the philosophy and concept of Community Education, their perceptions of how Community Education can best serve the community, their evaluation and judgment of past performance, their best thinking on improvement and growth, and, of course, their expectation of achieving some "impossible dreams."

The advisory council, community agencies, the Community Education staff, and community volunteers all work together to identify the needs and resources in the community (Step 2).*

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*The role of the community in the community assessment part of the planning process is discussed in the Target Topics guidebook on community assessment.

When community assessment is complete, the planning process proceeds to Step 3. The advisory council, the Community Education staff, and other interested citizens work together to match the identified needs with resources. Step 3--determining priorities--is a time for careful analysis and creative thinking.

If a major need exists for which the resources do not seem readily available, how can this need be met?

If a need exists which is being partially met by an inappropriate agency or group, how can the need be better met without creating bad feelings?

If there are valuable community resources that are not being utilized, are there programs that can be designed that will use the resources and still meet the major needs of the community?

After priorities are determined, the objectives are developed (Step 4). Objectives are the specific actions that will be taken to meet the larger organizational goals*.

The process works in this matter. Assume that one of the goals is to provide meaningful programs for senior citizens in the community, and that the community assessment showed specific interests on the part of seniors and the availability of resources to serve the specific interests. The planning group could decide (Step 3) that the first and third most common interestswould be met because there were no resources for the second most common interest. The group could then write two specific objectives under the goals of providing meaningful programs for senior citizens. They might be:

> "The Community Education Department will organize and sponsor a card tournament for senior citizens to take place each Wednesday afternoon during the school year. Evidence of achievement of this objective will be a report on the numbers attending as well as the personal evaluations of the participants."

> "The Community Education Department will cooperate with the community outreach program of Mercy Hospital to provide a once-a-month health screening clinic to be held at Jones Junior High on the first Thursday of each month. Evidence of achievement of this objective will be a report to the advisory council prepared by the staff conducting the clinic."

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*See page 9 for elements of effective objectives.

When the objectives have been determined, the specifics of how the objective will be met can be outlined (Step 5). The specific procedures for meeting the objective used as the first example would deal with how and who to recruit, how to publicize, who will supervise the tournament, how transportation will be provided and what facilities will be used and so on. Assignment of responsibility for the project and anticipated costs are also part of the specific steps needed to meet the objective.

Evaluation of the results of the goals and objectives (Step 6) is part of the planning process. Though needs and resource assessment and evaluation are discussed individually in the Target Topic Series, it should be noted that they are all part of the planning process and, indeed, are separate functions, but not separate components. A helix helps visualize the process because like the Community Education process a helix is continuous, moving and growing.

In an on-going, carefully planned program, through evaluation identifies needs and provides direction for growth. Evaluation is part of planning because without it, we would not have a measure of how effectively we were accomplishing what we had stated we would accomplish. And, the natural result of evaluation is change--change to expand, to correct, to modify, or to eliminate (Step 7).

Unless all seven steps are followed, planning is not complete. By following the logical progression through the seven steps, anyone can become a competent planner.

GOALS AND OBJECTIVES: THE FRAMEWORK OF PLANNING

Planning, to be effective, must begin with clearly stated goals and objectives and must include specific strategies, methods and activities to achieve the goals and objectives.

Goals are general statements describing the purpose or mission of an organization or program. Goals describe the expected result of combined efforts, resources, activities and money. Though goals are general and do not describe how the result is to be reached or who will be responsible for the work, they must be practical and realistic, and not idealistic. On the other hand, goals should do more than preserve the status quo; they should be the statements that cause growth and stimulate creativity in an organization.

A goal in Community Education might be: "To increase enrollment in adult enrichment classes by an average of ten per cent." Meeting or completing the goal is measured by asking, "Was enrollment in adult enrichment classes increased by an average of ten per cent?" The goal does not state how the result is to be achieved, but it serves as a motivator to action. In addition, goals are necessary for the successful evaluation of any program.

Also, though goals are general, they do cover a certain time span. One year goals are common in most programs, but short term projects will have goals for the period of the project. Setting long term goals-- covering a three to five year period - is very important for continued growth. If you have the bigger picture in sight, it is likely that the short term and one year goals will be part of the greater whole.

Objectives tell how the goals are to be attained; they answer what will be done, how it will be done, who will do it, when it will be done, and how it can be shown that the objective was accomplished. Objectives must be achievable, appropriate and measurable.

An objective that might be written to meet the goal given in the example could be: "The Community Education Director will, by September 10th, speak to three community groups to encourage participation in adult enrichment programs, as evidenced by a report to the Advisory Council."

This objective meets the criteria of all objectives. It states who is to take the action (the director), it states what he or she will do (speak to three community groups), it tells when the director will speak (by September 10), and it provides evidence of completion (report to the Advisory Council). The objective is also achievable (he or she will be

able to speak to three groups in the time allotted), appropriate (it can be assumed that public contact will increase interest in the program), and it is measurable (three speeches to three groups by September 10).

The specific steps to be taken to complete the objective are termed variously, strategies, methods or activities. Whichever term is used, they all outline how the objective will be achieved. Activities to meet the objective of giving three speeches to three community groups by September 10 could be:

1. Contact Lions Club and set date
2. Contact PTA and set date
3. Contact United Church study club
4. Write speech
5. Locate or make audio-visual materials
6. Contact president of each organization to confirm date and arrange for equipment
7. Make speech to Lion's Club
8. Make speech to PTA
9. Make speech to United Church study club
10. Write report to be presented to Advisory Council

Depending on the complexity of what is being planned, each step can be broken down into sub-steps. The all-important consideration is that each step must serve to meet the objective, and each objective must be a component of the action needed to achieve a goal.

PLANNING TOOLS AND TECHNIQUES

The steps in the planning process are the same whether the project or program to be planned is simple or complex, and the process is the same whether the planning is formal or informal: goals are decided, information is gathered, alternatives are listed, choices are made, objectives are stated, action in terms of methods and procedures are determined, progress is studied and modifications are added.

Certain tools and techniques have been developed to aid in the planning process, and they are helpful for many reasons: they provide a feeling for the overall picture; they serve as a checklist to keep tabs on progress, and they are a written, graphic or visual representation of the many and varied action steps needed to reach the stated goals.

SIMPLE LISTING

Each objective is written as the heading for a single list. The sequential steps (or procedures to meet the objective) are then listed. The time for completion of the specific step and the person responsible are included in the text of each step. Simple listing--also called point-to-point plans--assumes that each step is completed before the next step is begun.

Example:

Goal: To provide enrichment programs for the mentally retarded in the community.

Objective: The director will arrange a survey of persons responsible for the care of mentally retarded persons to assess interest in varied programs to be completed by August 20. Evidence of completion will be a tabulated list of interests.

Procedure:

Step 1. Identify all groups that deal with mental retardation in the community.

Start: April 30 (Time estimate one week)

Complete: May 7

Assignment: John Smith

Step 2. Check school agency, community governmental agencies for lists of persons with mental retardation.

Start: May 7 (Time estimate one week)

Complete: May 14

Assignment: Mary Brown

Step 3. Set up an ad hoc advisory group of people who are experienced in working with the mentally retarded. The purpose of the group will be to react to a survey and to suggest best method to conduct the survey.

Start: May 14 (Time estimate one week)

Complete: May 21

Assignment: John Smith

Step 4. Prepare rough draft of survey instrument.

Start: May 21 (Time estimate one week)

Complete: May 29

Assignment: John Smith, Mary Brown

Step 5. Arrange and conduct meeting of ad hoc advisory group to react to, modify and supplement survey draft and to determine survey procedures.

Start: May 29 (Time estimate one week)

Complete: June 4

Assignment: John Smith

Step 6. Prepare final survey instrument.

Start: June 4 (Time estimate one week)

Complete: June 11

Assignment: John Smith, Mary Brown

Step 7. Test survey instrument.

Start: June 11 (Time estimate one week)

Complete: June 18

Assignment: Ad hoc committee

Step 8. Find interviewers to conduct survey.

Start: June 18 (Time estimate one week)

Complete: June 25

Assignment: Mary Brown

Step 9. Train interviewers.

Start: June 25 (Time estimate one week)

Complete: July 2

Assignment: Mary Brown

Step 10. Conduct survey

Start: July 2 (Time estimate three weeks)

Complete: July 23

Assignment: Interviewers

Step 11. Tabulate results of survey.

Start: July 23 (Time estimate two weeks)

Complete: August 6

Assignment: John Smith, Mary Brown

Step 12. Prepare report on results of survey for advisory council.

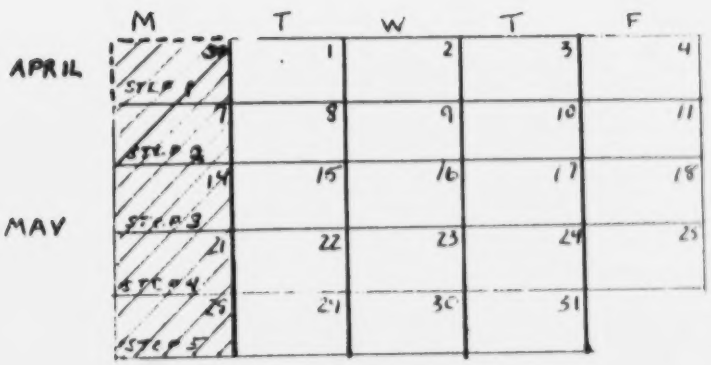
Start: August 6 (Time estimate two weeks)

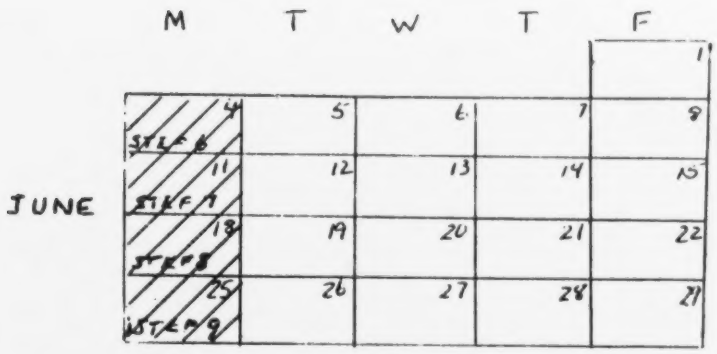
Complete: August 20

Assignment: John Smith

Simple listing or point-to-point plans can be shown visually by using a standard calendar.

Example:




M T W T F
JUNE
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11 STEP 9
12 13 14 15
18 STEP 10
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25 STEP 11
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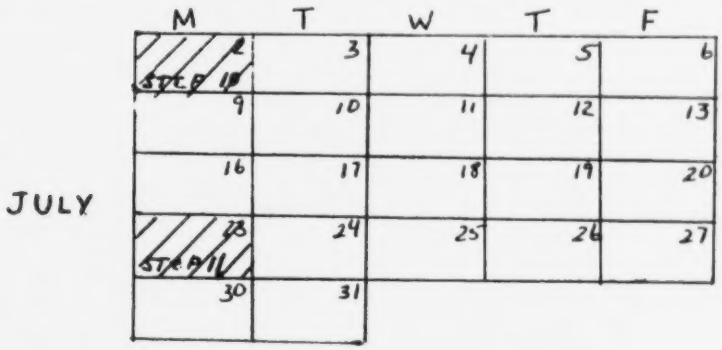
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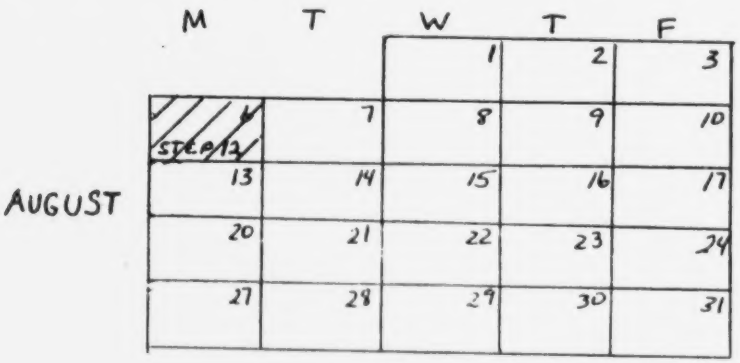

M T W T F
AUGUST
1 2 3
6 STEP 14
7 8 9 10
13 14 15 16 17
20 21 22 23 24
27 28 29 30 31

OVERLAPPING PLANS

Overlap plans are also written as a sequential list; but certain tasks or steps begin before the previous steps are completed. Overlapping the steps results in a shortened time span for the entire project. The time for each step remains the same, but because more than one procedure occurs at one time, the total time is lessened. Using the same project as in the point-to-point listing, the overlap listing would appear like this:

Step 1. Identify all groups that deal with mental retardation in the community.

Start: April 30 (Time estimate one week)

Complete: May 7

Assignment: John Smith

Step 2. Check school, agency, community, governmental agencies for lists of persons with mental retardation.

Start: April 30 (Time estimate one week)

Complete: May 7

Assignment: Mary Brown

Step 3. Set up an ad hoc advisory group of people who are experienced in working with the mentally retarded.

Start: May 7 (Time estimate one week)

Complete: May 14

Assignment: John Smith

Step 4. Prepare rough draft of survey instrument.

Start: May 7 (Time estimate one week)

Complete: May 14

Assignment: John Smith, Mary Brown

Step 5. Arrange and conduct meeting of ad hoc advisory group to react to, modify and supplement survey draft and to determine survey procedures.

Start: May 14 (Time estimate one week)

Complete May 21

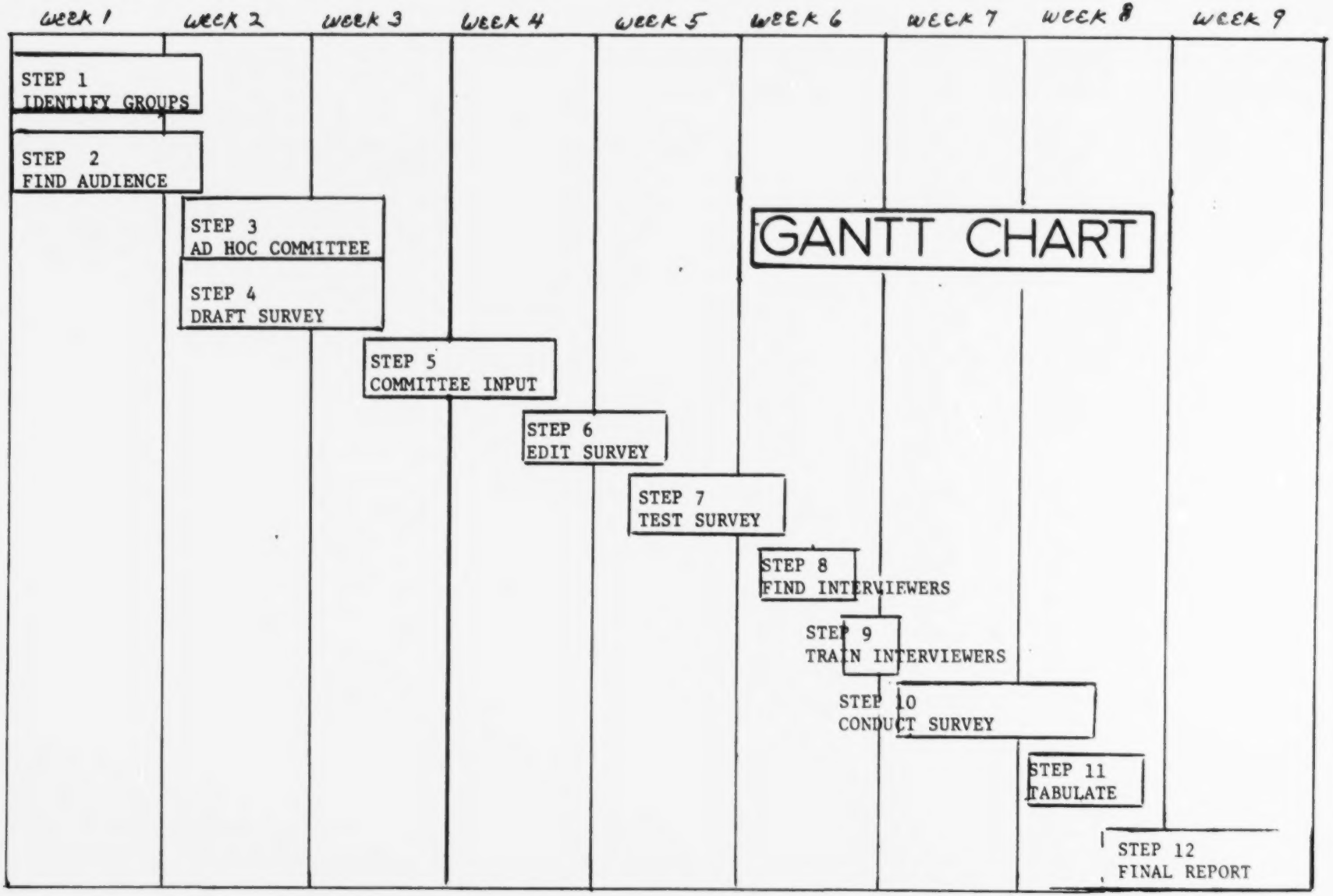
Assignment: John Smith

It is apparent that, even with a staff of two people, overlapping steps result in time saved (in the above example, the overlapping on just the first five steps has shortened the time span of the total project by two weeks).

Overlapping plans can be converted from a listing to graphic representation either by using a standard calendar or by converting the steps to a visual chart. This type of representation is often called a Gantt Chart.

The following illustrations show depiction of overlapping plans on both a calendar and on a Gantt Chart.

Monday	Tuesday	Wednesday	Thursday	Friday
30 Step 1 Step 2	1	2	3	4
7 Step 3 Step 4	8	9	10	11
14 Step 5	15	16	17	18
21 Step 6	22	23	24	25


WEEK 1
WEEK 2
WEEK 3
WEEK 4
WEEK 5
WEEK 6
WEEK 7
WEEK 8
WEEK 9
STEP 1
IDENTIFY GROUPS
STEP 2
FIND AUDIENCE
STEP 3
AD HOC COMMITTEE
STEP 4
DRAFT SURVEY
GANTT CHART
STEP 5
COMMITTEE INPUT
STEP 6
EDIT SURVEY
STEP 7
TEST SURVEY
STEP 8
FIND INTERVIEWERS
STEP 9
TRAIN INTERVIEWERS
STEP 10
CONDUCT SURVEY
STEP 11
TABULATE
STEP 12
FINAL REPORT

CRITICAL PATH PLAN

The critical path method of planning is used to shorten the total time allotted to a project by making certain that tasks that must be completed before others can begin are done in the proper order. Those tasks that must be done are called critical tasks. The critical path method, originally called PERT (Performance Evaluation Review Technique) was developed by the Navy to shorten the time of the Polaris Missile timetable by two years.*

The critical path method of planning may be too complex and not needed for planning the small Community Education operation. However, this method may be extremely useful for more complex programs that Community Education sponsors or cooperates in planning, such as all-community festivals or any in which there are a number of workers involved.

In critical path planning a sequential list is prepared, just as in the previous two planning methods. After the list is completed, an analysis is made to determine which tasks are critical, that is, which tasks cannot be begun before previous tasks are complete. Using the same project which illustrated the other methods of planning, we might determine that Step 5 is the critical task. (Arrange and conduct meeting of ad hoc advisory group to react to, modify and supplement survey draft and to determine survey procedures). Certainly before moving on to test a survey, the audience for the survey must be identified by checking all sources of information, the group which would have input into the survey must be contacted, and the survey draft must be prepared. If the staff for this project were larger than two people, or if those two people had time, there is no reason why the first four steps could not be done simultaneously--perhaps in one week.

The mental retardation project was selected for its simplicity and its application to the normal small district Community Education project. Because the critical path method of planning lends itself to larger projects that involve more people, the method can be better illustrated by selecting a more complex project. For example, if five community agencies

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*Note: PERT--a critical path planning method--is not to be confused with PER--Planning, Evaluation, Reporting required by the Minnesota State Legislature to ensure accountability of school district education goals.

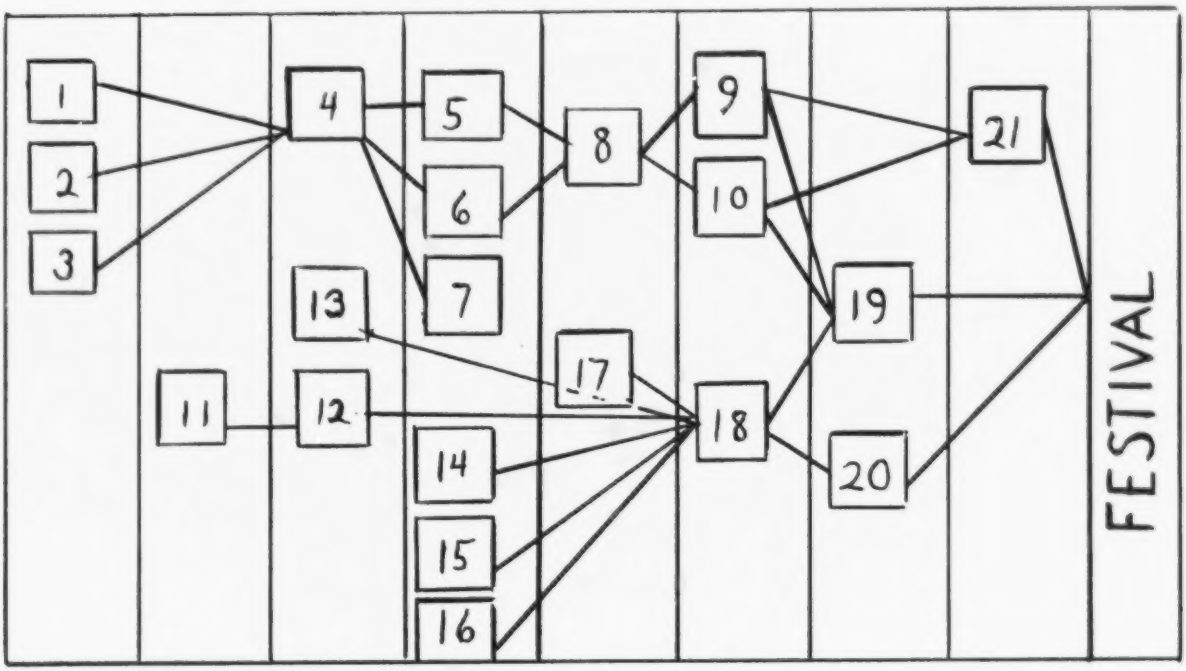
were cooperating in sponsoring a community heritage festival which involved many people in the planning process and for which there were many tasks to be done; assignments, control, and supervision could be handled with greater ease if the critical path method of planning were used.

In the critical path chart illustrated on the next page, tasks are entered on the chart according to their starting time. Tasks 1, 2, and 3 begin in the first week and are to be completed by the fourth week (at which time Tasks 5, 6, and 7 can begin). Task 11 begins in the second week of the project and must be completed in one week. It is apparent from looking at the chart that Task 4 is a critical task--steps 1, 2, and 3 must be complete before Task 4 can begin.

The amount of time spent on a project which uses the critical path method of planning is lessened because tasks that do not depend on the completion of previous tasks can begin earlier. The visual depiction on a chart allows the planner to "stay on top" of the project. He or she can see at a glance if the project is on schedule and can also determine where the bog-downs and bottlenecks are.

Let us assume that five community groups--Community Education, the library, the historical society, a local theater group, and the community orchestar--are sponsoring and planning the project. The major areas of responsibility might be: planning, publicity and promotion, speakers and workshops, entertainment, food, and facilities arrangements. Committees would be formed, and each committee would make a step-by-step listing of its tasks. Then the critical tasks--those which could not begin until previous work is done and which must be done before work on the committee project proceeds--would be identified. All of the tasks determined by each would be arranged in sequential order and numbered in that order. A graphic representation such as the following could then be constructed.

PERT CHART



FESTIVAL TASKS

1. Research literature
2. Research music
3. Research history
4. Plan pageant
5. Write pageant script
6. Write pageant music
7. Arrange stage and seating
8. Audition pageant performers
9. Practice pageant music
10. Practice pageant roles
11. Arrange carnival
12. Arrange carnival setting
13. Identify and hire celebrities
14. Arrange fireworks display
15. Arrange organized sports
16. Arrange family games
17. Arrange for food sales
18. Publicize festival
19. Final planning meeting
20. Final publicity
21. Dress rehearsal

ADMINISTRATIVE MANAGEMENT PLANS

The planning responsibilities of the Community Education director or coordinator are both serious and varied and for these reasons it may be helpful to the smooth operation of Community Education to chart the year's organizational plans. A carefully designed management chart allows the community educator to tell quickly if programs are on course, if people are meeting their responsibilities, and if the objectives are proceeding to meet goals. A management plan puts all the information in one place and, therefore, is a great organizational aid.

Management plan charts show in detail how the goals are to be accomplished. The information that is to be entered on the chart is carefully thought out. Each objective is studied to determine who will be responsible, what steps or activities are needed, and when to start and when to complete work on the objective. This information is then transferred to the chart.

The management plan is actually a series of pages stapled together. Each page contains the information which relates to one objective. (For clarity and future reference, each goal is assigned a Roman numeral--Goal I, Goal II, and so on. Each objective is numbered according to the goal it refers to--Objective I.1, Objective I.2, and so on.) If your project has three goals and each goal has four objectives, your management plan will be 12 pages. The following illustration shows the layout of a single sheet of a management plan.

GOAL I: To increase enrollment in adult enrichment classes this year by an average of 10 per cent

Objective I.1: The Community Education Director will, by September 10th, speak to three community groups to encourage participation in adult enrichment programs, as evidenced by a report to the Advisory Council.

RESPONSIBILITY	TASK	START-UP	COMPLE-TION	COM-MENTS
John Brown	Contact Lion's Club Contact PTA Contact United Church Write Speech Audio Visual Materials Confirm dates, arrange for equipment Deliver speech L.C., PTA,Church Study Group Write Report	Aug.15	Sept.10	

MONTHLY OR PERIODIC REPORTS

A form for periodic reports may be used as a visual update on progress toward achieving objectives. The reporting form is constructed by listing the goals and objectives in a column on the left side of a piece of paper. Abbreviated statements can describe the goals and objectives. Columns are made to indicate if the work is on schedule, behind schedule or completed. A comment column is to explain why tasks are delayed or ahead of schedule. Such report is also valuable to indicate the status of the entire progress when reporting to the school board, community groups and program review team.

PERIODIC PROGRESS REPORT				
	Behind Sched.	On Sched.	Com-pleted	Com-ments
GOAL I Increase enrollment by 10 per cent				
I.1 Three speeches				
I.2 Publish Newsletter				
1.3 Develop Mailing List				
GOAL II Initiate program for mentally retarded				
II.1 Survey for needs				
II.2 Set up ad hoc committee				
II.3 Coordinate with M.R. Agencies				

TIMELINES

Timelines give an overview of what work is going on, when it starts, how long it runs, and when it is completed. At a glance, timelines show when the work is heavy and when there are lighter periods. By plotting tasks on a timeline, it is possible to see where adjustments must be made. If too many deadlines for too many projects occur at the same time, hurry and frustration set in. By looking at the total picture, you can see when changes need to be made and can correct the problem either by starting sooner, seeking more help, elininating tasks, or changing the deadline.

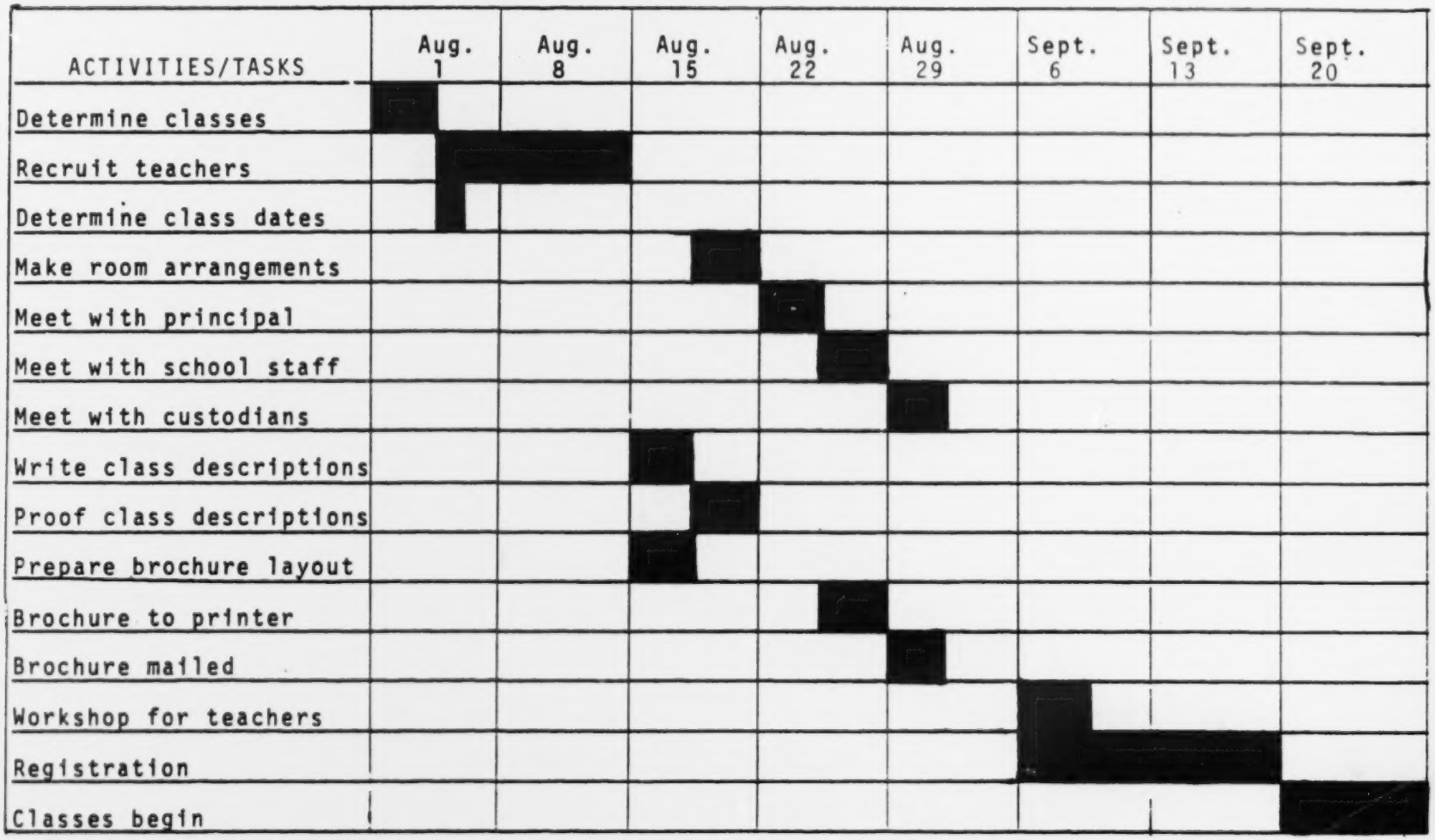
The entire year's program can be entered on a timeline, or each individual project, program, objective, or goal can be depicted on a timeline. The sample which follows illustrates the tasks needed to begin the fall Community Education program.

USING THE TOOLS

The efficient running of your Community Education program will be greatly improved if you commit yourself to using the various planning tools and techniques.

Use those which work for your Community Education system and be aware of the more complex tools which you may want to call into use from time to time. The time devoted to preparing the various calendars and charts is well spent because the planning guides and aids do provide for organization and clarify responsibility and direction.

TIMELINE


ACTIVITIES/TASKS
Aug. 1
Aug. 8
Aug. 15
Aug. 22
Aug. 29
Sept. 6
Sept. 13
Sept. 20
Determine classes
Recruit teachers
Determine class dates
Make room arrangements
Meet with principal
Meet with school staff
Meet with custodians
Write class descriptions
Proof class descriptions
Prepare brochure layout
Brochure to printer
Brochure mailed
Workshop for teachers
Registration
Classes begin

PLANNING YOUR PERSONAL PROFESSIONAL TIME

Time not wisely spent is costly. Certainly it is expensive in terms of the cost of inefficiency. But a person's time which is poorly managed is also costly in terms of feelings of frustration, inadequacy, pressure and lack of freedom.

Personal time management is also planning, and uses the same process as all other planning. The techniques for providing more effective and fulfilling use of your time can be learned just like other planning techniques. The steps are the same as in all planning:

1. Decide your goals (day-to-day, short term and long term) for both your personal and professional life.

2. Determine the objectives that will cause you to reach your goals.

3. Organize the steps, methods and procedures you will follow to complete your objectives.

4. Set timelines and deadlines.

5. Plan a method for personal evaluation to provide yourself with the awareness of how you are doing.

6. After your self-evaluation, modify your goals and move on.

There is the same kind of resistance to "time management" that there is to planning and for the same reasons. However, the time you save to be used otherwise, and the sense of feeling that you are in charge of your own life, are well worth time management efforts.

The standard "To Do" list, with some modification, is the backbone of time management. A "To Do" list should be made every day. Some authors suggest that it be made at the beginning of the day, and others suggest that the list should be the final task of the day. Either way may be effective for you. For those who can't complete all their tasks in one day, it may be wise to make the list at the close of work. In this way the undone items can be included on tomorrow's list, and the worry of incompletion will not be taken home. Some people find that the start of a new day is the best time for quiet personal planning.

A "To Do" list consists of all tasks that you must do, all tasks that you would like to do, and tasks that relate to your private life (such as haircuts...which also take time). After you list the tasks, you must determine the priority of each task in terms of its importance. Determining your own priorities is the same as making decisions in organizational planning. To aid your determination, put all tasks into one of three categories. Call those which are urgent and immediate "A". Tasks which are important but not as urgent put in category "B". Those tasks which are unimportant, unnecessary or unproductive place in group "C".

After you have made your list, stick to it. Rank order each item within each group. Then proceed with the first task in the "A" group. Work on that task until it is completed; then go on to the next. If you follow this kind of plan, you will notice you are accomplishing much more than you did in the past and that you are accomplishing the right things. You may find that you had been spending much time on "C" tasks and that they are the things that have been holding you back. The "C's" tend to be the small, unimportant, time-filling things we do. They tend to be much more numerous than the really important tasks. Without setting priorities (A, B and C), we may feel we have accomplished a lot, but a careful look will show us that we have done mostly "C's".

In addition to preparing a daily "To Do" list, you should set aside some time each day for planning. Ten minutes spent in planning will save 30 to 40 minutes of actual work time. This is true because in planning we mentally determine alternatives, select the best course of action, identify the steps to accomplish the action, and outline them in a logical sequence. Thus, planning eliminates trial-and-error and going off in the wrong direction. If possible, keep your planning time inviolate--close the door, ask that phone messages be taken, and let others know that you don't want to be disturbed.

G. Alec MacKenzie in The Time Trap identified universal time wasters. Some are caused by other people: waiting, interruptions, meetings, phone calls, and work that isn't done right the first time. Other time wasters are self-caused: procrastination, inefficient use of the phone, mail and reading materials, lack of delegation and the inability to say no. McKenzie points out that we have control over both outside and internally caused time wasters. Some of his suggestions are:

> Waiting...Some waiting is unavoidable. Never be caught with your hands empty; carry reading material or other work with you. Then if you have to wait, you can accomplish some task and eliminate feelings of frustration.

Interruptions...Set aside your planning hour and let others know that this time is yours. If one person is a constant interrupter, perhaps you need to have a short meeting, either daily or weekly, with this person to answer questions and clarify information. If you have one, ask your secretary to preserve your private work time. Train and give your secretary the authority to handle many of the routine matters that cause your interruptions.

Work that isn't done right the first time...This problem is often a problem of communication. As each task or assignment is given, check to see that the assignment is understood, that the instructions are clear, that the deadline is known. Take time at the time the assignment is given to answer all questions and to clarify all points. By taking time at this point, you will avoid needless interruptions and you ensure that the work will probably be done correctly and on time.

Procrastination...We all procrastinate, and we all procrastinate for the same reasons. Either we put off unpleasant tasks because they are boring, tedious, insurmountable or too complex. Planning and using a "To Do" list are the major cures for procrastination. Boring and tedious tasks--if they are important or urgent and cannot be delegated--will be given an "A" priority on your list. Because you have committed yourself to follow the priorities on your list, and because you have committed to complete each task, you will accomplish the necessary tedious and boring tasks. Insurmountable and complex tasks will seem less confronting if they are broken down into small parts. Then handle each step in sequence, either yourself or by delegating it to someone else. Use your private planning time to determine how to approach the big problems that face you.

Phone Calls...If you have one, your secretary can handle the routine calls and take messages for you to return all calls that are not of a real crisis nature. When you return calls, do them all at once. Grouping your phone calls will save a good deal of time. Plan your phone calls, that is, plan what you are going to say and what points you want to make. Jot down some notes. Doing this will avoid being misunderstood or having to call back because you have forgotten to tell your caller something important.

Mail...Handle each piece of mail or other paper initially to determine what follow-up or action is needed. Each piece of paper that crosses your desk requires some action, even if it is being placed in the wastebasket. Set aside a time each day for paper work. Separate the paper work into categories: those that require an answer, those that require a task to be done, those to be read later, and those to be tossed. Answer all mail at once. If you have a secretary, group your dictation. If you do not, respond either on the letter itself or by note. Add any tasks that result from mail and other paper that crosses your desk to your "To Do" list. Delegate as many as you can. Reading matter should not remain on your desk until you get around to it. Prepare a folder for materials you want to read. This is the material you carry with you to read during the times you are kept waiting.

Delegation...A common statement in Community Education is "But I have no one to delegate to." We all have someone to delegate to, but in Community Education we may have to be more creative than the business person who has myriads of paid employees. Secretaries can take on many more responsibilities than they are usually assigned and are often happy to have the chance to do the more important or meaningful tasks. A working advisory council provides opportunities for delegation. If you develop a partnership with your council and develop in the members the feeling that Community Education is their responsibility, you will find that they can take on many of the tasks. Volunteers are important in Community Education. Involve teens, senior citizens, teachers in your program, and other people who are interested in your program. The chief hurdle is asking for help. Learn to ask.

Inability to say No...Many of us take on too much and find ourselves harried and hassled. Handle this problem by knowing beforehand just how much available time you have. Analyze the amount of time you have currently committed. Project any free time blocks you might have. Then, when you are asked to take on another task, you can say, in hosesty, "No, I don't have the time." (It may be wise, when asked by somebody to take on another chore, to say that you need time to analyze your work load. Taking time to think eliminates the quick "people-pleasing" response that so many of us feel we should make.)

Meetings...Much unnecessary time is spent in meetings. Certain basic rules will ensure that meeting time is well spent. Always have a prepared agenda. If the meeting is formal, mail the agenda beforehand. If the meeting is informal, state the agenda at the outset. At the beginning of the meeting ask for additions to the agenda. (This prevents the presentation of the time-consuming controversial surprise item.) Predetermine the time needed for each agenda item. If you are in charge of the meeting, see that the time frame is adhered to. (Just by having the amount of time for each item listed will eliminate much extra conversation--people will check themselves to see if their comments are important.)

Make sure that meetings start on time and end on time. Even if some people aren't present, begin the meeting anyway. They will soon learn to be on time or will have to face the embarrassment of always being late. And, if they are late, you should speak to them.

Each decision that is made at a meeting should be written down. The decision should be restated, the people who have duties arising from the decision should be clear in their responsibility, and any questions or uncertainties should be cleared up at the time the decision is made.

Meetings should have closure. Review the meeting, outline all action that must take place before the next meeting, and set the date for the next meeting. As soon as possible after the meeting, mail the minutes to those who attended the meeting.

MOVING FROM PLANNING TO ACTION

The best laid plans of mice and men do "often go astray" unless they are followed by action adhered to through commitment, and modified when they don't work or nor longer apply. All the lists, charts, and graphs in the world will do little unless they are looked at as the tools and techniques that move you from "where you are" to "where you would like to be."

Community Education plans become Community Education programs, activities and services only through action. A commitment to meet the goals and objectives that have been decided upon through the planning process is essential and each person involved in bringing Community Education to the community must share in this commitment. And all plans--goals and objectives, methods and strategies, and the planning tools that are used--should be constantly evaluated and re-evaluated to determine if they apply, if they are current, and if they work to produce the desired result.

If you plan carefully and thoughtfully, and if you follow your plans with deliberate and committed efforts, you can,indeed, make your dreams for Community Education come true.

WHAT DO YOU KNOW NOW?

(The questions at the beginning of the guidebook are repeated below. Now that you have read and studied the materials, you may wish to go back over the questions again to check your knowledge and understanding of the main ideas contained in the guidebook.)

1. Why is planning important to the "process" of Community Education?
2. Why is community assessment part of the planning process?
3. Why is planning important for Community Education programs?
4. Why are people resistant to planning?
5. What is planning? How much time does it save?
6. What is the process that connects means and ends?
7. What are the seven steps in planning?
8. How does evaluation relate to planning?
9. What is a goal? What is an objective?
10. What are the components of an objective?
11. What is the function of planning tools and techniques?
12. What is the "simple listing" or "point-to-point" planning tool?
13. What is an overlapping plan and when would it be used?
14. What is a Gantt Chart?
15. What is the "critical path" method of planning?
16. What are the components of an administrative management plan?
17. What is a timeline and for what is it used?
18. How does time management relate to planning?
19. How is a "To Do" list used in personal planning?
20. What can you do to save time--in waiting, interruptions, handling mail and in meetings?
21. How can you avoid procrastination?

SUGGESTED READINGS

Burbach, Harold J., and Larry E. Decker, editors. Planning and Assessment in Community Education. Midland, Michigan: Pendell Publishing Company, 1977.

Four chapters in this book discuss planning. Chapter Two discusses the importance of planning and outlines the components of planning. Chapter Three details a nine-phase approach to planning a new Community Education system. Problem-solving techniques which aid in planning are discussed in the third chapter. Chapter Four stresses the importance of process--of involving people--to unified planning.

Bittel, Lester R. The Nine Master Keys of Management. New York: McGraw-Hill Book Company, 1972.

Although this book deals with management from a business perspective, it contains much material that is helpful to the community educator. The chapter devoted specifically to planning discusses planning tools and gives illustrations of how they work.

Mackenzie, R. Alec. The Time Trap. New York: McGraw-Hill, 1975.

The Time Trap tells how to get more done in less time. The book helps you to analyze how you spend (and waste) your time and tells how to plan your time for efficiency and effectiveness. The time wasters that are discussed in this guidebook are covered in depth by Mackenzie.

Lakein, Alan. How To Get Control of Your Time and Your Life. New York: Peter Wyden, Inc., 1973.

Lakein's time management book is an excellent paperback that gives guidelines and suggestions for organizing your work life. The book discusses the importance of assessing your work load, setting priorities and getting on with the job.